

The Marine Corps Promotion Board Process

An after-action report from a board member

by LtCol Jason W. Heuer

I was recently presented the opportunity to serve as a member on a Fiscal Year 2019 (FY19) promotion board. The intent with this article is to exploit this fascinating and enlightening experience to aid all Marines (especially fitness report authors) who seek to understand the promotion process. Certainly, other essays or after-action reports of this variety are available across our Corps, so it is important to keep in mind while reading that these are the opinions and observations of one board member and may not be identical to the opinions and observations of other members of this specific board.

Observations from the Conduct of the Board

That other fellow board members may not agree with the observations and opinions below is a good byproduct of the board process. Each member brings with him some bias, preconceived notions, and unique perspectives regarding the numerous factors that will be considered when making recommendations regarding candidates' potential for further honorable service at the next rank. It is a near certainty that these perspectives will change during the conduct of board, potentially causing some to wonder if he, as a member, has been erratic in his reviews/decisions, and fairly and equitably briefing and voting. In fact, it is highly doubtful any board member ever believed, "I did a great job as a member." Rather, he more than likely stated, "The board process is fair, well-orchestrated, and absolutely

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effective." This thinking reflects well on the promotion system because it demonstrates that the process generates true commitment from the board members. The Marine Corps should be proud of this process.

A board is instructed to "seek the best and most fully qualified." Every board precept will contain these words and they resonated constantly with each member. Unfortunately, at the beginning, though, the board knew good

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Marines would be denied promotion or designation because of the restraints placed on this particular board by the force structuring process and what the manpower models and leadership determined was the optimal number of selectees. That is why each candidate received the board's full attention; recommendations had far-reaching effects on the future of the Corps and the individuals being considered. "Full attention," explained further, meant that the

board members scrutinized every document and fitness report in the Master Brief Sheet (MBS) and Organizational Master Personnel File (OMPF) of the candidates. Thus, it is essential to recall that the objective of the Fitness Report is to communicate to a board and is not intended as a counseling tool. Board members expect, recognize, and appreciate reports written to the board rather than the Marine.

A detailed description of the board-room mechanics is beyond the scope of this article. To provide some insight, though, know that each member was randomly provided a block of candidates to review and prepare to brief. After the board was expertly instructed by the Marines from the Promotion Branch, members were provided full access to their candidate's MBS, every report that formed the MBS, OMPF, letters to the board, training data, and picture (if provided). During this board, each member had approximately twenty minutes per candidate to fully screen the package, prepare notes and observations, and determine their recommendation to the full board regarding the candidate's promotability. Briefing began after all packages were prepared. Each candidate was briefed by the member who prepared his package and each board member was able to view everything the briefer was provided, except the briefer's notes. After the package was briefed, (typically in one minute or less), each board member voted. After all packages were briefed, final voting took place to arrive at the final number

| K. REVIEWING OFFICER COMMENTS | | | |
|---|---|--------------------------|--|
| 1. OBSERVATION: <input type="checkbox"/> Sufficient <input type="checkbox"/> Insufficient | 2. EVALUATION: <input type="checkbox"/> Concur <input type="checkbox"/> Do Not Concur | | |
| 3. COMPARATIVE ASSESSMENT: Provide a comparative assessment of potential by placing an "X" in the appropriate box. In marking the comparison, consider all Marines of this grade whose professional abilities are known to you personally. | DESCRIPTION | COMPARATIVE ASSESSMENT | |
| | THE EMINENTLY QUALIFIED MARINE | <input type="checkbox"/> | |
| | ONE OF THE FEW EXCEPTIONALLY QUALIFIED MARINES | <input type="checkbox"/> | |
| | ONE OF THE MANY HIGHLY QUALIFIED PROFESSIONALS WHO FORM THE MAJORITY OF THIS GRADE | <input type="checkbox"/> | |
| | A QUALIFIED MARINE | <input type="checkbox"/> | |
| UNSATISFACTORY | <input type="checkbox"/> | | |
| 4. REVIEWING OFFICER COMMENTS: Amplify your comparative assessment mark; evaluate potential for continued professional development to include: promotion, command, assignment, resident PME, and retention; and put Reporting Senior marks and comments in perspective. | | | |
| 5. I CERTIFY that to the best of my knowledge and belief all entries made hereon are true and without prejudice or partiality. | | | |
| (Signature of Reviewing Officer) | (Date in YYYYMMDD format) | | |

The RO's comments and comparative assessment remains the "truth teller" for performance evaluation. (MARINE CORPS ORDER P1610.7F Ch 2.)

of recommendations for forwarding for consideration by Headquarters Marine Corps and the Secretary of the Navy. There are more details regarding the intricacies of the process, but the above should provide the reader a general understanding.

Importance of Effective Communication with the Board

Communication with a board arrived in multiple forms (fitness reports, letters to the president of the board, the picture quality of the OMPF documents, etc.). The superior item in this list, as all should reasonably know, was the fitness report. Board members spent a majority of package preparation and briefing time reviewing fitness reports. Training summaries, pictures, etc., were certainly reviewed but generally just with a quick scan. If these items were deemed "good" in the members' mind after the scan, they moved on. If something "caught their eye" (i.e. a poor picture, low PFT/CFT, etc.), it received greater scrutiny. The intent, though, of the quick scan was to allow the briefer to focus a majority of the preparation time on the fitness reports and develop a precise picture of the candidate through his documented performance.

Board members typically started review of a package by looking to see if the candidate wrote a letter to the president of the board. Based on personal observation, few did, but in many

instances, it would have assisted considerably if he had—especially when marks or comments did not match (i.e. low marks but hyperbolic comments or vice versa). When a member or the entire board encountered these packages, there was actual head-scratching; members repeatedly stated,

This package doesn't explain the attribute or Reviewing Officer (RO) marks, and I really wish someone had taken the time to write to the board to explain this."

Below are generic descriptions of actual cases the board encountered when a letter or detailed explanation would have been beneficial. These examples are generic summaries based on multiple occurrences.

- A Marine was marked down in a specific attribute category on consecutive reports in grade by the same reporting senior (RS), yet the word picture remained constant.
- A Marine was "down blocked" by the same RO on consecutive, in-grade reports.
- A Marine's specific attribute mark was decreased on consecutive in grade reports by the same RS, while the same RO "upblocked" him on the Christmas Tree.

These examples "strained" a briefer because he didn't know definitively if it was a deliberate act to communicate to the board a lack of progress by the Marine or if it was the result of a poorly

produced report by the RS/RO. In the absence of an explanation, most members weighed the mark and resulting relative value (RV) more heavily, vice weighing the Section I comments. The bottom line is: it is essential that marks and comments are unified so that a clear picture of the candidate is created for the board members. This emphasizes the need for every RS to be absolutely hawkish regarding managing his RS and RO profile.

Small RS and RO profiles are a near certainty in boards that are screening relatively junior personnel, but a lot of the issues listed above were the result of not simply immature RS and RO profiles but fitness report amateurs. It was not unusual to see two reports written by a RS, with a profile size of three, on the same Marine where one was a low 80s cumulative RV and the next would be the 100 cumulative RV. Reviewed separately, one report looks great, one looks terrible. There were savvy RSs with immature profiles who utilized the afforded space in Section I to provide perspective on their RS profile, but only a very few. All Marines should be afforded the opportunity to prepare and write reports as RSs, but it was fairly obvious who had received adequate counsel and guidance on the science and art of report writing.

The fitness report amateurs, I argue, relied heavily on Section I comments that over the course of the board became cliché and meaningless, including:

- "Completed tasks with minimal supervision."
- "Valued member/asset of the command."
- "Outstanding moral compass."
- "Progressing well."
- "Ready for more responsibility now"
- "Outstanding enthusiasm."
- "An energetic self-starter."

Personally, these comments were generally disregarded because one of the biases I brought to the board was a belief it is acceptable to assume these traits are already apparent in the Marine officer eligible for promotion. Perhaps I am missing something regarding the subtleties of using the above phrases, but as one who reviewed these comments over and over, they started to miss the

intended impact. Board members, after settling into their role and seeing and hearing enough packages, noted the *lack* of breakout comments and inferred that the Marine had not broken out. It is a subtle game, but boardrooms are very observant and intuitive. It helped the member and the process significantly when subtlety was set aside and objective/easy to interpret comments were constructed.

A board member searched the fitness reports for the breakout comment(s) because he cut and paste it into his briefer notes and read it aloud to the boardroom to advocate for his recommendation. Examples, in my opinion, of good to great breakout comments were:

- “The #1 lieutenant in the battalion this period.”
- “This Marine will remain at the top of my profile for this grade for a long time.”
- “Clearly exceeding the requirements of his billet.”
- “Clearly the best candidate for (high profile job).”
- “Briefer—brief this Marine as a high 5/6.”
- “This Marine is already operating at the senior levels of the next rank. Promote well ahead of peers and start to break him out from his peer group.”
- “The absolute subject matter expert on (subject). He is sought out by outside commands to educate them on (subject).”
- “This Marine is able to do not just his job, but mine as well.”
- “Do not send this Marine to a staff job. Keep him in front of Marines in the operational forces.”
- “This is my best candidate to serve as an instructor at TBS/OCS.”
- “I would trust this officer to lead my son/daughter.”

Examples of what the RS/RO probably thought were good comments but were actually viewed negatively:

- “This Marine has an excellent personal PT program and can often be found perfecting his MCMAP skills.”
- “Outstanding military appearance.”
- “Promote with peers.”
- “Friendly, outgoing personality.”

It was recognized that not every

Marine gets the above-listed good to great comments because not every Marine earns them. The intent with the criticism of cliché comments is to arrest the momentum/overuse, as these comments have lost their impact. Yet a high amount of RSs and ROs use them. The concern is that Marines Reported On who receive the overused comments recycle them when later serving as an RS/RO, and unless this momentum is arrested, comments that board members may be better able to utilize to accurately portray the Marine will be further reduced. When the recycling of these comments is combined with the issues noted above regarding the inversion of marks and comments, one can see how a board might struggle to definitively decide the future of a Marine and his potential for service in the next rank. With a limited amount of time to prep and brief a package, briefers are moving efficiently and quickly. Cliché comments may be disregarded and thus not benefit the Marine in the manner the RS/RO intended.

Guidance/Thoughts to Future Board Members

If you are asked to serve on a board, it is an opportunity. There is no better PME for how to evaluate and screen subordinates (and future replacements). Road shows, PowerPoint briefs, nor any similar instruction replicates what one can learn actually serving as a board member. Thus, if you are called or volunteers are sought, it is not a burden to your schedule. Seize the opportunity. Having served on a board, a member, almost without fail, will never write a fitness report the same way again. Participation on a board is a grind but undoubtedly worth it. This statement is designed only as a forewarning, not a complaint, as preparing and briefing hundreds, even thousands, of packages over the course of the working days requires mental, even physical, stamina to stay focused. The candidates for promotion or selection deserve the commitment.

Seek out and introduce yourself to fellow board members. Learn their MOS and background. It will be important not for your personal network,

but because they can help you screen a package from their community/Military Occupation Specialty (MOS) that you may have not been exposed to or understand. If you serve as an aviator, expect to get many requests to help understand an aviator’s progression. This is NOT a slam on non-aviator MOSs. If an individual has not been exposed to or educated about another MOSs progression and service structure, it is unreasonable to expect one to understand it and subsequently be well-positioned to brief an aviator’s package. Whereas aviators can generally understand an infantry officer’s progress in a battalion to a point, that may not be reciprocated.

Thoughts for the Reporting Senior/ Reviewing Officer

Be consistent with your RS and RO marks, especially if writing consecutive reports on a Marine in grade. As noted above, unexplained decreases in RV, specific attributes, or on the Christmas tree certainly gained the attention of the briefer and often the entire boardroom. The increase in RV or RO marks on consecutive reports was viewed as progress by the Marine. Thus, one can see how the opposite was interpreted. Again, ensure the word picture matches the marks. Confusion for the board member or boardroom generally does not benefit the Marine.

Mandate your Marines to take care of their OMPF. Just as there were many packages/OMPFS without pictures, there were plenty of packages that clearly had not been reviewed by the Marine. The board saw numerous packages with no documents in the commendatory/derogatory section, unreadable scans, etc. Many Marines failed to have their college degree, Basic Officer Course graduation certificate, MOS school completion certificate, etc. inserted in their OMPF. When there was little to no assistance from the candidate for a board member working diligently to accurately depict the candidate in preparation for boardroom briefing, it unconsciously (fairly or not) signals to the briefer that the Marine does not care. If the marks and word pictures do not break out the Marine, the nail in

the coffin (or the difference between a three and a four vote) may be that the Marine did not prepare his OMPF or have a current picture.

- A unit check-in sheet for a Marine should include an over-the-shoulder review of his OMPF by his new RS and a mandatory trip to Combat Camera if the picture is greater than six months old or not present. Remember, everything in the OMPF and MBS should be considered a method of communicating to the board. Every document, scan, report, etc., is reviewed by the briefer.
- Task your subordinates to get a GOOD picture done. In fact, that is already taken care of, as CMC has published it as a task. It is on senior officers to supervise. There were plenty of lousy pictures, and they were certainly scrutinized (odd facial expressions, “chicken wing” arms, lack of shirt stays, oversized/too small garments, etc.). Good pictures were scanned, acknowledged, and the board moved on.
- If/when subordinates are in zone for these boards, make sure they know it and take the opportunity to educate them on the promotion process.

Utilize whatever means are made available and/or necessary to tell the board a story, especially if it is a positive one. The A-PES provides addendum pages. Use this resource in order to tell the story of a Marine’s service that reporting period. During this board, they were used only to document an adverse report and the Third Officer review. The resource is available—use it.

Finally, SECNAV/statutory boards do not *require* a picture or completion of Professional Military Education (PME). Our Commandant, however, has directed Marines to complete these tasks, as they are viewed as indicators of professionalism and commitment. Failure to submit a picture was interpreted as a signal to the boardroom. Packages without the mandated picture were very common, but “acceptance” by the board only went so far. Specifically, it was acknowledged/assumed that 1st lieutenants with just nine months TIG without pictures probably did not even know they were in zone. Ultimately,

this is the responsibility of the Marine, but it does indicate that junior officers have not been well-instructed and mentored by their more experienced seniors. That same acknowledgement was not provided to captains/senior first lieutenants considered for designation. The lack of a picture was unquestionably a negative. Additionally, for this particular board, lack of PME was not *necessarily* a negative at this point in service but being at least enrolled was deemed a positive.

Aviation-specific:

Aviators were generally in one of three stages of their aviation career at the time of these boards:

- Flight School,
- Fleet Replacement Squadron (FRS), or
- Operational squadron for no greater than one year.

The flight school reports were unobserved, academic reports because the Marine was in the training pipeline. Some of the FRSs are doing the same, while others are doing observed reports. The lack of uniformity among the FRSs was discussed in the verbal after-action the board conducted with the president. For the captain’s promotion board, unless there was adverse material, it was essentially automatic that the young Marine aviator was recommended for promotion. This, I conclude, irritated, to a slight degree, the ground-MOS board members because they were not able to scrutinize these Marines’ performance and fit for the next rank due to lack of observed reports. Meanwhile, the ground-MOS candidates who were the peers of the student aviators were scrutinized in detail and some subsequently were not selected for promotion. From a certain perspective, one could say these Marines were non-selected because they *had* sufficient observed time and reports for the board to utilize in its decision-making process. They had performed at least to an acceptable level but were non-selected, while their student pilot peers were selected and were yet to receive an observed fitness report. This is a factor of the aviation pipeline and syllabus and the many planning factors that go into ensuring a sufficient

amount of qualified aviators are in the operating forces.

For the designation board, the frustration was more readily apparent from the ground-MOS board members because the 540 days of observed time that the aviators had accumulated on multiple occasions still did not provide sufficient material for the briefer or board to evaluate the package. Specifically, many young aviators are getting the 80-82 RV report with “vanilla” or “middling comments” that convey almost nothing to the boardroom. Further, if a ground-MOS Marine in zone for either board received the 80-82 RV report with “vanilla” or “middling comments” and little apparent progression, the potential was high that he got the “3” recommendation and was not selected during batch voting. This inversion, I argue, frustrated members who had seen good ground-MOS Marines go unselected while aviators with the same quality of reports were selected. Aviators on the board were able to well explain the length of the training pipeline, the evolution of the aviator in his operational squadron, etc., from an objective point of view in order to provide the boardroom perspective and explanation, but the inversion still did not rest well with most members.

Thus, if you, as an aviator, seize the opportunity to serve as a board member, ask the Board President if you may briefly explain to the boardroom the progression and development of aviators. This would have saved some “teeth-grinding” during my experience. In retrospect, I would have spent more time explaining that the aviator’s time as a captain in the operating forces is generally where the breakout occurs, so the majors’ promotion board will have much clearer descriptions available to them regarding the aviation Marines performance and progress. It may not have completely assuaged the low degree of frustration, but it may have helped.

The biggest take away from the review of many aviator packages and reports, however, is the significant amount of poorly written reports by aviators serving as RS/RO. Combine this observation with the above-noted

frustration and one may grasp why non-aviation MOS board members were frustrated with the low quality of aviator fitness reports. Specifics I noted:

- Low marks (80-83 RV) were not explained in the Section I comments.
- The section of this AAR that discussed cliché comments was the most apparent in aviator packages, far and away. Reporting Seniors in the rank of captain were the most egregious. Their inexperience with writing and managing fitness reports was on ready display to the boardroom. Truly, I was asked on a few occasions, “Why can’t you guys (aviators) write reports well?”

• Remarks focused primarily on the ground job of the aviator and did not tell the boardroom if he was performing well in the syllabus of his assigned platform. If the Section I comments were not used to explain whether or not an aviator was progressing as expected in his syllabus, it was generally negatively interpreted. Aviation MOS board members really wanted to see those comments and told their fellow members to look for them to brief the boardroom. On the occasions where the candidate had one to two years of observed time in an operational squadron, I argue the comments regarding aviation skills progress were generally low in quantity and insufficient in quality. Without statements about where the Marine was in terms of syllabus progression, it was natural for the briefer, especially if he was an aviator, to reasonably assume there was no progress. The certainty of this conviction was low, at best, because the RS/RO had not effectively communicated, via the report, to the boardroom. There were exceptions, but an insufficient amount to negate this observation.

There were multiple instances where the RO comments obviously were provided by the RS or were simply repeated

| PERFORMANCE EVALUATION SYSTEM | | | | | | | | | |
|---|--|-----|-----|------|------|------|-----|-----|--|
| MCO: P1610.7F CH 2 | | | | | | | | | |
| SAMPLE Reviewing Officer Comparative Assessment Profile | | | | | | | | | |
| BGEN JOHN J MARINE | | | | | | | | | |
| SSN: XXX-XX-XXXX | | | | | | | | | |
| As of: XXXXXXXX | | | | | | | | | |
| Assessment Mark | Description | | | | | | | | |
| 8 | The eminently qualified Marine | | | | | | | | |
| 7,6 | One of the few exceptionally qualified Marines | | | | | | | | |
| 5,4,3 | One of the many highly qualified professionals who form the majority of this grade | | | | | | | | |
| 2 | A qualified Marine | | | | | | | | |
| 1 | Unsatisfactory | | | | | | | | |
| MRO Rank | # of Reports/Assessment Mark | | | | | | | | |
| LTCOL | 0/1 | 1/2 | 1/3 | 4/4 | 7/5 | 10/6 | 2/7 | 0/8 | |
| Total # of Reports: 25 | | | | | | | | | |
| MAJ | 0/1 | 0/2 | 1/3 | 8/4 | 12/5 | 5/6 | 2/7 | 0/8 | |
| Total # of Reports: 28 | | | | | | | | | |
| CAPT | 1/1 | 1/2 | 2/3 | 31/4 | 30/5 | 7/6 | 1/7 | 0/8 | |
| Total # of Reports: 73 | | | | | | | | | |
| CWO3 | 0/1 | 0/2 | 0/3 | 1/4 | 3/5 | 0/6 | 1/7 | 0/8 | |
| Total # of Reports: 5 | | | | | | | | | |
| MSGT | 0/1 | 0/2 | 0/3 | 0/4 | 1/5 | 0/6 | 0/7 | 0/8 | |
| Total # of Reports: 1 | | | | | | | | | |
| GYSGT | 0/1 | 0/2 | 0/3 | 0/4 | 2/5 | 1/6 | 1/7 | 0/8 | |
| Total # of Reports: 4 | | | | | | | | | |
| Total # of Observed Reviews: 136 | | | | | | | | | |
| Total # of Reports Over 30 Days Old: 8 | | | | | | | | | |

All reviewing officers should understand their own comparative assessment profile. (MARINE CORPS ORDER P1610.7F Ch 2.)

comments of the RS. Board members were not shy about noting the laziness of the RO, therefore giving them more examples that supported the statements noted in the second bullet.

Many (perhaps even the majority) of aviators had spent zero time preparing their packages. Specifically, the top half of the MBS contained clear administrative errors in many instances (e.g. CH-53E pilot with a H-1 FRS MOS, etc.), the photos were old or non-existent, and there were significant date gaps, etc. To be fair, many ground MOS candidates had the same low level of preparation, but it was especially apparent in the 75XX pool of candidates by a long shot.

It was surprising (and disappointing) how many aviators had low PFT/CFT scores. Multiple ground-MOS board members commented that they noticed this. Combine this with the observations noted to this point, and one can see how the reputation of the aviation community was negatively impacted.

Thoughts Going Forward

Review the Program of Instruction at Expeditionary Warfare School, Command & Staff College, and the Commander’s Courses to determine, honestly, if captains and junior field grade are being educated sufficiently regarding how to write *effective* fitness reports that a boardroom finds useful. Bring in members of recent boards to spread the PME.

Reporting Seniors should personally brief the RO to the maximum extent practical and justify marks and comments for the Marines Reported On. Many ROs utilize the RO Worksheet in order to get this information from the RS, but a more pointed discussion, face to face, I argue would have prevented some of the issues regarding inversion of the marks and comments. RO’s should not be leery of returning low quality reports to the RS for rework. The RS, in the cases presented to this board, were still junior in many cases and could have benefitted from this RO-level scrutiny. This suggestion is only effective if one assumes the RO is adept at creating quality reports.

Conclusion

The first thing my boss said to me when I returned from Service on this board was, “You’ll never write a fitness report the same again, will you?” My answer was an emphatic, “No, sir.” I am convinced every board member walked away from this experience with a reinforced understanding of senior Marines’ obligation and responsibility to communicate well to a board and manage their profile. It is essential as a leader, and I am optimistic the above observations will serve as another reinforcement of this hallmark of our Service.

